



Welcome to Bloomerang Academy

Thank you for joining us!



Housekeeping

Live Transcript

We all know what we want to do is spend
administration and more time Doing the w

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Chat



Raise Hand



Q&A



Live Transcript

Share ideas

Ask questions

Housekeeping

Dial in audio access: **+1 669 900 6833**

We will share the slides and recording of this session with you via email later today.

Any questions we are not able to answer live or in the Q&A will be addressed after the session via a follow-up.

If you need further assistance, please reach out to support@bloomerang.com. Our support team is amazing!

Poll



Paula Coggeshall

Senior Customer Success Manager

Paula Coggeshall has been a Senior Customer Success Manager at Bloomerang since 2016. Her proudest moment was being part of the team awarded the Promise Neighborhood designation for the Near Eastside. She loves live music: concerts, musicals, whatever she can get! And one of her favorite pursuits is baking with her daughter!



Grant Tracking



What will we cover today?

Best Practices for Grant Tracking in your Bloomerang Database!

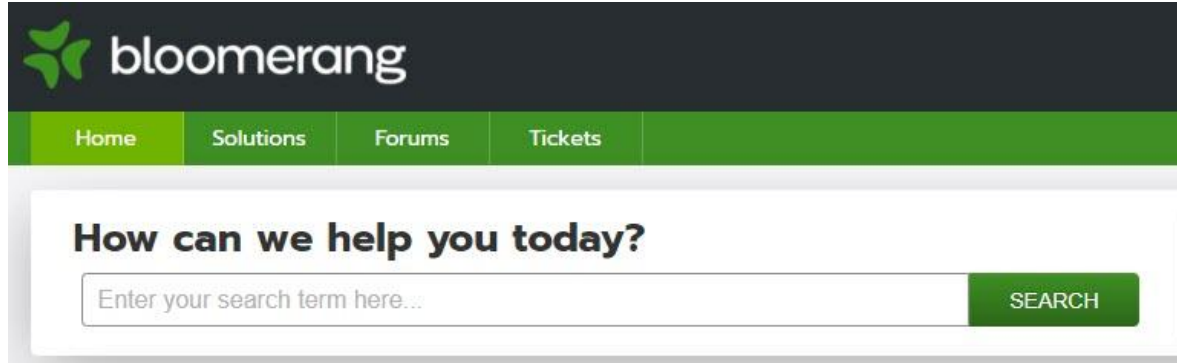
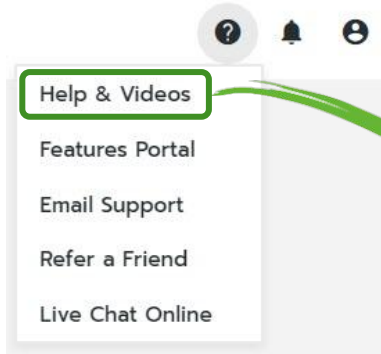
Settings and Customization

1. Settings - Transaction Fields
2. Settings - Notes Fields (CUSTOM)
3. Recommended Grant Tracking Workflow
4. Award Entry
5. Reporting
6. Past Grants
7. Resources

Into the database we go!

Resources

Bloomerang Knowledgebase and Support Portal



Resources

Knowledgebase

- [Grant Tracking](#) - help article with short overview video
- [Custom Field Basics](#)
- [Notes](#)
- [Tasks](#)
- [Report Basics](#)



Resources for Researching Grants

- [Candid](#) (Free & Paid Versions)
- [Grants.gov](#) (Free)
- [Grantstation.com](#) (Free Newsletter, Paid Search tool)
- [Grantmakers](#) (Free)
- State Websites (Free)
- DonorSearch Online Suite of Tools (paid subscription)





Thank you for attending!

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